



## THE STATE OF DELAWARE

### **Agency Checklist of Steps for Processing Donated Leave Requests**

#### **DL-1: Request for Donated Leave**

1. Recipient employee completes Part I of the "DL-1 Request for Donated Leave" with the exception of the dates sick and annual leave are exhausted and has attending physician complete "Part VI – Physician's Statement." Employee also completes the "DL-4 Authorization to Release Information for Solicitation Purposes."
2. Recipient employee submits the completed DL-1, including Physician's Statement, and completed DL-4 to their agency personnel/payroll office for processing.
3. Recipient employee's agency personnel/payroll office verifies recipient is eligible to receive donated leave and completes all of Part II of the DL-1; and Part I for the dates the employee's sick and annual leave are exhausted.
4. Recipient employee's agency personnel/payroll office initiates solicitation steps.

#### **DL-2: Request to Make a Direct Donation**

1. Donor completes Part I of the DL-2 - "Request to Make a Direct Donation" and submits the application to their Supervisor or Division Director.
2. Donor's Supervisor or Division Director will approve or disapprove the donor's donation, complete Part II of the DL-2, and forward to the donor's agency personnel/payroll office.
3. Donor's agency personnel/payroll office completes Part III of the DL-2, certifying donor's hourly rate of pay, effective date of pay rate, and availability of hours and forwards to recipient employee's agency personnel/payroll office.
4. Recipient employee's agency personnel/payroll office completes a "Donated Leave Calculation Worksheet" for each pay period included in the request for Donated Leave to determine need for donated hours.
5. Recipient employee's agency personnel/payroll office completes Part IV of the DL-2, indicating the disposition of donated hours and forwards the completed DL-2 form to the donor's agency personnel/payroll office.
6. Donor's agency completes Part V of the DL-2, certifying the reduction of hours made to the donor's sick leave and annual leave accounts and files a copy in donor's file. Donor's agency returns the DL-2 to the recipient's agency personnel/payroll office.

#### **DL-3: Application to Make a Direct Donation to the Donated Leave Bank**

1. Donor completes Part I of the DL-3, "Application to Make a Direct Donation to the Donated Leave Bank" and submits the application to their Supervisor or Division Director.
2. Donor's Supervisor or Division Director will approve or disapprove the donation, complete Part II of the DL-3, and forward to the donor's agency personnel/payroll office.
3. Donor's agency personnel/payroll office certifies donor's hourly rate of pay and reduces donor's sick leave and annual leave accounts; completes Part III of the DL-3, and forwards the application to the Office of

Management and Budget/Human Resource Management Section (OMB/HRM). (Send to the address on the DL-3 form.)

4. OMB/HRM completes Part IV of the DL-3, certifying hours and dollar value of donation credited to the Donated Leave Bank, returns signed original form to donor's agency, and files a copy for their records.
5. Donor's agency files application in donor's file.
6. OMB/HRM emails the "Funds Available in the Donated Leave Bank" memo to all Statewide Donated Leave agency personnel to inform them of available funds.

#### **DL-4: Authorization to Release Information for Solicitation Purposes**

1. Recipient employee completes DL-4 and forwards to their agency personnel/payroll office for reference by employees wishing to donate leave. (This form should be completed and turned in with the DL-1 form).
2. Recipient employee's agency personnel/payroll office forwards DL-2 forms to employees named by the recipient employee; advises agency employees of employee request for donation and informs agency employees that more specific information is on file in the agency personnel office.
3. If sufficient donations do not materialize within the recipient employee's work unit, agency personnel office expands solicitation to recipient employee's work facility, prior work units, division, department or agency.
4. If sufficient donations are not received after 15 calendar-days, the recipient's agency may request that the OMB/HRM distribute a single Statewide Solicitation.
5. If sufficient funds are still not received 15 calendar-days after the Statewide Solicitation, the recipient's agency may request Donated Leave Bank hours. The OMB/HRM administers the Donated Leave Bank.

#### **Direct Donation Solicitation**

1. Recipient's agency distributes solicitation(s) for Donated Leave within their organization and to employees named by the recipient employee on the DL-4 form; advises agency employees of employee request for donation and informs agency employees that specific information is on file in the agency personnel office.
2. Direct Donations are processed by the recipient's agency not OMB/HRM. Documentation should not be forwarded to the OMB/HRM unless requesting Donated Leave Bank hours.

#### **Statewide Donated Leave Solicitations**

1. If additional donations are required 15 calendar-days after recipient's agency internal solicitation, the recipient's agency may request a single Statewide Solicitation from the OMB/HRM. If sufficient donations are not received 15 calendar-days after the single Statewide Solicitation, the recipient's agency may request Donated Leave Bank hours.
2. Requests for Statewide Solicitations should be sent to the OMB/HRM via e-mail. Requests should include the exact verbiage to be used in the Statewide Solicitation as well as the name and address of person at the recipient's agency who should receive the forms.
3. Direct donations received as a result of the Statewide Solicitation are processed by the recipient's agency; not OMB/HRM. Documentation should not be forwarded to the OMB/HRM unless requesting Donated Leave Bank hours.

#### **Donated Leave Bank**

1. The recipient's agency forwards a copy of the DL-1 and medical certification within the most recent 30 days with supporting Donated Leave Calculation Worksheets to the OMB/HRM.

2. Donated Leave Bank hours are approved and awarded to the recipient employees in the order they are received when funds are available. The OMB/HRM notifies the Donated Leave Committee by e-mail that a request has been made and reviews the application and provides a recommendation regarding recipient employee eligibility and award of hours from the State of Delaware Leave Bank.
3. The Office of Management and Budget Director, or designee, will approve or disapprove the Donated Leave Committee's recommendation.
4. The OMB/HRM emails the recipient's agency contact that the request for donated leave from the Donated Leave Bank has been approved, and forwards a copy of the completed DL-1 to the recipient employee's agency personnel/payroll office.
5. The recipient's agency personnel/payroll office credits the employee with any approved donated leave received from the Donated Leave Bank using the "Donated Leave Calculation Worksheet."

### **Donated Leave Calculation Worksheet**

1. The "Donated Leave Calculation Worksheet" is to be used by the recipient employee's agency personnel/payroll office to calculate the conversion of hours from donors to the recipient and to document the source and use of donated leave on a pay period basis.
2. Recipient employee's agency personnel/payroll office enters information into the calculation spreadsheet. Some fields will calculate automatically. The following is an explanation of each field on the spreadsheet.

#### **Pay Period Data:**

- ☐ Paycheck Date

Enter the check date of the pay period this worksheet represents. (Refer to the PHRST System Schedule of Due Dates available on the PHRST web site.) Complete a separate worksheet for each biweekly pay period.

- ☐ Pay Period

Enter the dates of the pay period this worksheet represents. (Refer to the PHRST System Schedule of Due Dates available on the PHRST web site.) Complete a separate worksheet for each biweekly pay period. Donated Leave must be applied beginning with the earliest date employee is on leave without pay. Donated Leave must be used concurrently with FMLA if the recipient is in an unpaid status while on FMLA.

- ☐ Number of Work Days

Enter the number of workdays in the pay period. If the pay period includes holidays, include those days in the total number for the pay period.

#### **Recipient Data:**

- ☐ Employee Name

Enter the employee's name.

- ☐ Hours/Day

Enter the hours normally worked per day by the recipient employee.

- ☐ Total Pay Period Hours

Calculated field (Number of Work Days multiplied by amount in Hours/Day)

- ☐ Hours Worked

Enter the number of hours the employee worked during the pay period. This field should be left blank if the employee did not work during the entire pay period.

- ☐ Short Term Disability Hour equivalent

Enter the number of hours represented by the 75% (or other percentage) STD compensation on the Explanation of Benefits (EOB).

- ☐ Wage Replacement Program

Enter the category of wage replacement, workers' compensation, personal injury protection, social security, private insurance, etc. and the number of hours represented in base pay received by the employee

- ☐ Sick Leave/Monthly Accruals

Enter the number of hours of the recipient's sick leave used during the pay period. Include any sick leave accruals used as they are accumulated. (Recipient employee will continue to accrue sick leave each month that the employee remains in a paid status.)

☐ Annual Leave/Monthly Accruals

Enter the number of hours of the recipient's annual leave used during the pay period. Include any annual leave accruals used as they are accumulated. (Recipient employee will continue to accrue annual leave each month that the employee remains in a paid status.)

☐ Holiday Pay

Enter the number of hours of holiday pay included in the pay period.

☐ Comp Time

Enter the number of hours of the recipient's comp time used during the pay period.

☐ Hours Not Covered by Donated Leave/Docked Hours

Enter the number of hours not eligible for Donated Leave or hours that were docked.

☐ Bal. Forward from Previous Worksheet

Enter Donated hours remaining from the worksheet from the previous pay period. This would show as a negative number in the "Remaining Requested Hours" field. (A positive number must be entered in this field.)

☐ Total Hours Requested

Calculated field (Total Pay Period Hours minus sum (Hours Worked, Sick Leave, Annual Leave, Holiday Pay, Comp Time, Hours Not Covered by Donated Leave/Docked Hours, and Bal. Forward from Previous Worksheet))

☐ Biweekly Rate

Enter recipient's biweekly rate of pay earned for the period of time requested as appears in PHRST

☐ Hourly Rate

Enter recipient's hourly rate of pay earned for the period of time requested as appears in PHRST

**Donor Data:**

☐ Donor Name

Enter name of each donor.

☐ Original Donation

Enter the amount of the original donation from each donor listed on the worksheet. If a donation exceeds the need for the pay period represented on the worksheet, remaining hours must be carried over to the next spreadsheet in the "Bal. Forward from Previous Worksheet" field. If donations exceed the need for donations, hours must be returned to the donor.

☐ Donation Used

Enter the number of hours donated by each donor.

☐ Donation Not Used

Calculated field. (Original Donation minus Donation Used)

☐ Donor's Hourly Rate

Enter each donor's hourly rate of pay.

☐ Donor Hours Converted to Recipient

Calculated Field. (Donation Used multiplied by Donor's Hourly Rate)

☐ Remaining Requested Hours

Calculated Field. (Total Hours Requested minus Donor Hours Converted to Recipient)

If this number is a positive number, the recipient is still in need of Donated Leave hours for this pay period.

If this number is a negative number, the recipient has received excess hours and the remaining hours may be carried over to the next pay period's worksheet in the "Bal. Forward from Previous Worksheet" field on the next worksheet. Enter as a positive number on the next worksheet.

☐ If the recipient is no longer in need of Donated Leave,

Return the excess hours and credited back to the donor.

☐ Agency Certification

Must be signed and dated by an authorized signer designated by each agency.

3. Recipient employee's agency personnel/payroll office certifies the "Donated Leave Calculation Worksheet" and enters the hours in the PHRST payroll system. Hours must begin to be credited on first day.

4. Worksheets should not be forwarded to the OMB/HRM unless recipient's agency is requesting Leave Bank hours and there are hours available in the Leave Bank. (See Donated Leave Bank.)